

ABSTRACT

A method and system architecture for managing the objects used in simulating a financial-type plan. Objects are hierarchically arranged with fields therein that specify financial information including dates, rates, amounts of objects and strings. The fields may be selectively chosen to be dependent on the dates, rates or amounts of other objects, whereby any change made to the value in one field is automatically linked to any related fields. Each field alternatively be given a fixed value, and fields, whether fixed or referenced to another field, may be accompanied by an adjustment field that offsets the value in the field. Objects may be grouped in packages, and objects and packages may be selectively enabled and disabled, whereby such objects will be included or omitted from the financial simulation calculations without having to reenter or delete those objects. The objects used in the financial planning may be synchronized with financial information from another program so as to use more updated amounts.